

SENIORS' HOUSING REPORT

Atlantic



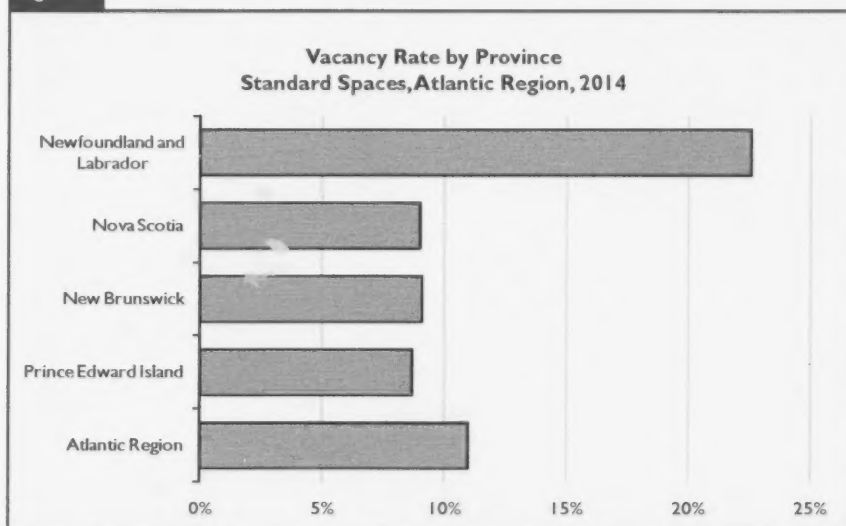
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2014

Highlights

- The overall vacancy rate for a standard space¹ in the Atlantic Region was 11.0 per cent in 2014 compared to 11.2 per cent in 2013.
- Vacancy rates were lowest in New Brunswick this year at 8.7 per cent, followed by Prince Edward Island at 9.0 per cent and Nova Scotia at 9.1 per cent. The vacancy rate in Newfoundland and Labrador remained higher than the rest of the region at 22.6 per cent partially due to a relatively strong preference to age in place.
- The average rent for a standard space in the Atlantic Region was \$2,415 this year compared to \$2,137 in 2013.

Figure 1



Source: CMHC.

¹A standard space is a space that is occupied by a resident who receives a standard level of care of less than 1.5 hours per day.

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The Majority of Atlantic Standard Spaces are in New Brunswick

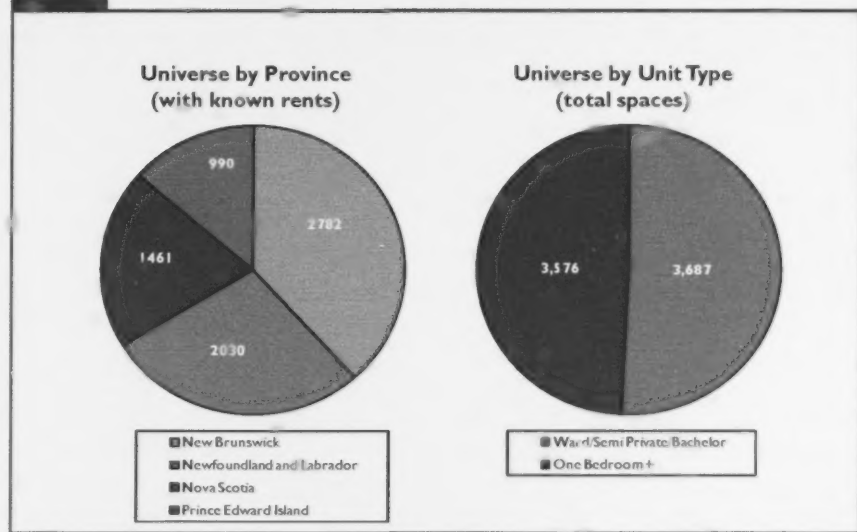
CMHC's 2014 Seniors' Housing Survey included 172 residences, housing 6,781 residents in 7,263 spaces. The majority of these spaces, 5,386, were identified as standard spaces. A standard space is a space that receives a standard level of care (as opposed to a heavy level of care) of less than 1.5 hours per day. The remaining 1,877 spaces surveyed were non-standard spaces². A non-standard space is a space that provides heavy care, offers respite accommodations or offers below market or subsidized rents.

The majority of standard spaces surveyed in the Atlantic Region were located in New Brunswick at 2,486 spaces. Standard spaces accounted for nearly 90 per cent of all surveyed spaces in New Brunswick. In Nova Scotia, 1,461 total spaces were surveyed in 2014 of which nearly all spaces surveyed (1,410) were standard spaces. In Newfoundland and Labrador, the 2014 Seniors' Housing Report surveyed 2,030 total spaces of which the majority, 1,206, were non-standard spaces.

The most common unit type of standard spaces in the Atlantic Region were one-bedroom plus units at 3,388 units, or about 63 per cent of all standard spaces. The remaining 1,998 standard spaces in the region included ward/semi-private or bachelor units.

The capture rate of the 2014 survey in the Atlantic Region was 3.8 per cent. The capture rate is defined as the ratio of the total number of residents living in the surveyed universe divided by the estimated population aged 75

Figure 2



Source: CMHC

and over. Capture rates varied across the region, ranging from a high of 8.3 per cent in Prince Edward Island to a low of two per cent in Nova Scotia. The relatively low rate in Nova Scotia was attributed to a number of structures in the province not meeting survey requirements for unit counts (structures must have more than five units) or age criteria for residents (the survey requires that over half of residents be aged 65 or older).

Aging Population Base Continues to Support Demand

Demand for seniors' housing in the Atlantic Region continues to be supported by an aging population base. In Atlantic Canada, there are estimated to be 179,400 people over the age of 75 with the majority living in Nova Scotia. In 2013, the population estimates of Statistics Canada showed that for age cohorts 0 to 14 and 15 to 64, every Atlantic province reported a population decline compared to 2012.

The 65 and over cohort, however, reported an increase of four per cent or more in each of the four Atlantic provinces.

Atlantic Region Total Space Vacancy Rate Increased in 2014

The vacancy rate for total spaces, which includes both standard and non-standard spaces increased to 11.7 per cent in the Atlantic Region in 2014 as each province reported an increase.

In Newfoundland and Labrador, higher vacancy rates in the Central and Eastern Region pushed the provincial vacancy rate up to 20 per cent in 2014. This year, the total number of spaces surveyed in the Central and Eastern Region increased to 938 spaces from 667 in 2013. The expansion of the survey universe in 2014 contributed to the vacancy rate increase in this region of the province due to the inclusion of more structures with higher vacancy rates.

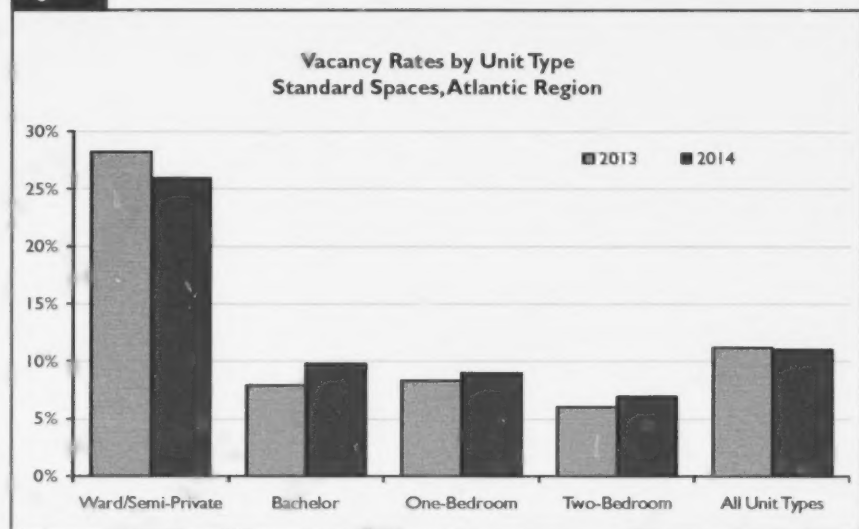
²A non-standard space is defined as a space that provides heavy care, offers respite accommodation or offers below market or subsidized rents.

In Prince Edward Island, all counties in the province recorded higher vacancy rates. While the demand remained relatively stable in the local markets, the increase in the vacancy rate can be partially attributed to changes in the number of spaces surveyed.

In Nova Scotia, results were mixed with increases in Halifax and declines in the rest of the province. As a result of the sharp increase in Halifax, where vacancies climbed from 1.6 per cent to 6.4 per cent, the overall provincial rate increased to 9.0 per cent. In Halifax, recent elevated levels of apartment construction, much of which is targeted at the aging population base, shifted some demand away from seniors' housing and toward apartment rental.

In New Brunswick, a falling vacancy rate in the Northwest, Northeast and Central Regions was more than offset by an increase in the vacancy rate in the Southwest and Southeast region (where vacancies climbed 2.7 percentage points) and pushed the overall provincial vacancy rate up to 8.1 per cent this year. Similar to

Figure 3



Source: CMHC

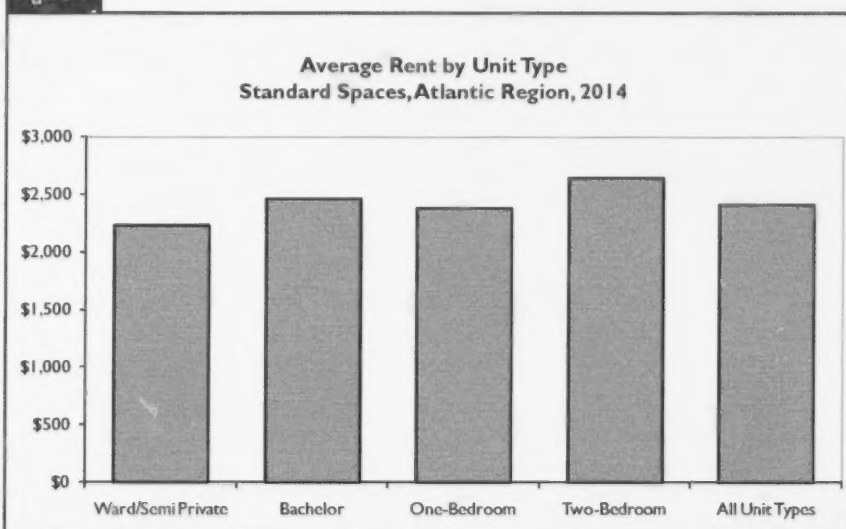
other parts of the Atlantic Region, the total number of spaces surveyed in New Brunswick in 2014 increased significantly from 1,810 to 2,782 spaces. The expanded survey universe in 2014 contributed to the overall increase in the province as a result of more structures having higher vacancy rates than the previous year's average.

Atlantic Standard Space Vacancy Rate Declined in 2014

The vacancy rate for standard spaces in the Atlantic Region declined to 11.0 per cent in 2014 compared to 11.2 per cent in 2013. The slight decline was attributed to a decline in Newfoundland and Labrador where vacancies decreased to 22.6 per cent in 2014 from 25 per cent last year. Despite the decline in Newfoundland and Labrador, the other three provinces reported more vacancies.

Outside of Newfoundland and Labrador, the overall vacancy rate for standard spaces in the region was around nine per cent this year. Specifically, in Nova Scotia, the vacancy rate for a standard space climbed 0.6 percentage points to 9.1 per cent. In Prince Edward Island, vacancies increased from 6.6 per cent in 2013 to nine per cent this year, while in New Brunswick vacancies climbed 1.9 percentage points to 8.7 per cent in 2014.

Figure 4



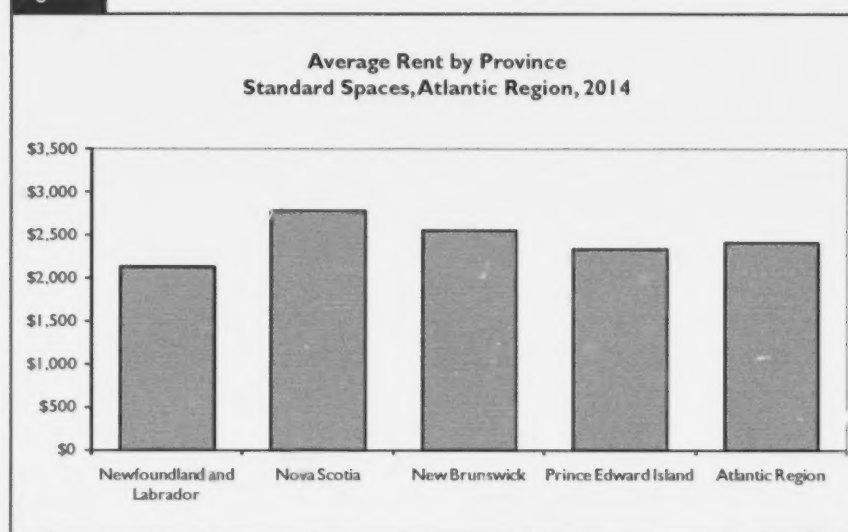
Source: CMHC

In Newfoundland and Labrador, vacancies remained higher than in the rest of the region. Demand for standard spaces is relatively weaker for various reasons. Local market intelligence suggests that there is a strong preference to age in place in Newfoundland and Labrador. Furthermore, Statistics Canada's National Household Survey indicates that homeownership rates in Newfoundland and Labrador are the highest in the country. These two factors suggest a high cultural preference for homeownership and a reluctance to leave their homes for other types of housing contributing to the relatively high vacancy rate in seniors' residences.

Another factor impacting Newfoundland and Labrador's vacancy rate is the fact that the vast majority of spaces tend to be smaller in size – 95 per cent are ward, semi-private or bachelor spaces. With a high propensity to remain in their single family homes, there is little demand from homeowners for these smaller living spaces.

Vacancy rates by unit type were mixed in the 2014 survey. In the ward and semi-private segment, declines in both Newfoundland and Labrador and Prince Edward Island contributed to an overall decline in the regional vacancy rate to 25.9 per cent. In the bachelor segment of the market, a sharp increase in vacancies in Prince Edward Island more than offset a decline in New Brunswick and resulted in the vacancy rate climbing to 9.8 per cent this year. The increase in Prince Edward Island was impacted by the relatively small number of standard space bachelor units where even a small change in the number of vacant spaces has a large impact on the vacancy rate.

Figure 5



Source: CMHC

Services and Amenities

Some of the structures included in the 2014 Seniors' Housing Survey included various amenities and services in rent charges. These services and amenities included offerings such as meals, on-site medical services, a registered nurse, a pharmacy transportation service, exercise facilities and other services.

At the regional level, three meals were offered in 87 per cent of the structures surveyed. The most common service offered in 2014 was a 24-hour bell call service which was offered at over 88 per cent of surveyed structures. The second most common service was transportation, which was offered at 77 per cent of surveyed structures. Internet access was included in 72 per cent of structures while on-site medical care was available in half of the surveyed structures this year.

Average Rents Increased in 2014

The average rent for a standard space in the Atlantic Region was \$2,415 in 2014 compared to \$2,137 last year as rents increased in each province. Rents were highest this year in Prince Edward Island at \$2,785 and were lowest in Newfoundland and Labrador at \$2,130. In each province, rising operating costs and steady demand had some impact on the increase in the average rents. In 2014, however, there was also a substantial increase in the number of residences surveyed in most parts of the region. The expanded survey universe in 2014 contributed to the overall increases reported across the region as a result of more structures having higher rents than the previous year's provincial and regional average rents.

TABLES INCLUDED IN THE ATLANTIC REGION SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom		Total	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Newfoundland and Labrador	37.3	35.5	**	12.2	13.0	8.2	**	**	25.0	22.6
Prince Edward Island	11.4	9.6	4.8	11.5	4.3	4.1	**	**	6.6	9.0
Nova Scotia	**	**	7.5	7.5	9.5	10.8	5.5	6.3	8.5	9.1
New Brunswick	**	16.0	14.0	7.5	5.4	8.7	4.2	8.6	6.8	8.7
Atlantic Region	28.2	25.9	7.9	9.8	8.3	9.0	6.0	6.9	11.2	11.0

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range (\$) Atlantic Region

Province	Less than \$1,500		\$1,500 - \$1,999		\$2,000 - \$2,499		\$2,500 and more		Total where rents are known	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Newfoundland and Labrador	**	**	35.5	35.3	5.3	8.5	5.7	9.7	25.0	22.8
Prince Edward Island	**	**	14.1	11.9	6.6	10.0	3.4	8.9	8.5	9.8
Nova Scotia	5.0	5.0	9.5	17.2	8.5	20.0	9.5	7.2	8.5	9.1
New Brunswick	4.5	10.5	**	4.1	12.0	10.2	6.7	5.4	6.5	8.7
Atlantic Region	4.6	7.7	26.1	23.5	8.2	10.6	7.5	6.9	11.6	11.1

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)

Atlantic Region

Province	Total Number of Spaces	Overall Vacancy Rate		Number of Residences	Number of Residents	Estimated Population Aged 75+ ¹	Capture Rate ² (%)
		2013	2014				
Newfoundland and Labrador	2,030	14.9	20.0	39	1,725	35,800	4.8
Avalon Region	576	14.5	15.8	12	505		
Central & Eastern Region	938	17.4	26.8	18	737		
Labrador & Western Region	516	12.5	12.6	9	483		
Prince Edward Island	990	5.5	8.7	24	929	11,200	8.3
Kings & Prince County	420	6.4	7.9	11	397		
Queens	570	4.8	9.3	13	532		
Nova Scotia	1,461	8.5	9.0	37	1,434	73,500	2.0
Halifax	548	1.6	6.4	9	551		
Northern NS & Cape Breton	364	16.2	13.2	9	329		
Southern NS & Annapolis Valley	549	12.1	8.9	19	554		
New Brunswick	2,782	6.1	8.1	72	2,693	58,900	4.6
Northwest, Northeast & Central Region	1,154	11.8	9.5	35	1,092		
Southwest & Southeast Region	1,628	4.3	7.0	37	1,601		
Atlantic Region	7,263	9.3	11.7	172	6,781	179,400	3.8

¹ Source: Statistics Canada, Population Projections for Canada, Provinces and Territories, 2009-2036, Scenario 3.

² The capture rate is the proportion of the population aged 75 and over living in the survey universe.

The following letter codes are used to indicate the reliability of the estimates:

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** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

2.1 Universe of Total Spaces by Unit Type Atlantic Region

Province	Ward/Semi Private/Bachelor	One Bedroom +	Total
Newfoundland and Labrador	1,938	92	2,030
Prince Edward Island	783	207	990
Nova Scotia	387	1,074	1,461
New Brunswick	579	2,203	2,782
Atlantic Region	3,687	3,576	7,263

2.2 Universe by Unit Type Atlantic Region

Province	Ward/Semi Private/Bachelor	One Bedroom and Two Bedroom +	Total
Newfoundland and Labrador	1,938	92	2,030
Standard Spaces	771	53	824
Non-Standard Spaces	1,167	39	1,206
Unknown Spaces	-	-	-
Prince Edward Island	783	207	990
Standard Spaces	499	167	666
Non-Standard Spaces	284	40	324
Unknown Spaces	-	-	-
Nova Scotia	387	1,074	1,461
Standard Spaces	344	1,066	1,410
Non-Standard Spaces	43	8	51
Unknown Spaces	-	-	-
New Brunswick	579	2,203	2,782
Standard Spaces	384	2,102	2,486
Non-Standard Spaces	195	101	296
Unknown Spaces	-	-	-
Atlantic Region	3,687	3,576	7,263
Standard Spaces	1,998	3,388	5,386
Non-Standard Spaces	1,689	188	1,877
Unknown Spaces	-	-	-

2.3 Universe of Standard Spaces and Rent Range (\$) Atlantic Region

Province	Less than \$1,500	\$1,500 - \$1,999	\$2,000 - \$2,499	\$2,500 +
	% of Total ¹	% of Total ¹	% of Total ¹	% of Total ¹
Newfoundland and Labrador	9.9	52.7	35.9	11.4
Prince Edward Island	4.0	30.6	14.9	50.5
Nova Scotia	15.5	12.0	8.5	64.0
New Brunswick	9.8	4.0	58.8	27.5
Atlantic Region	9.1	16.7	36.8	37.4

¹ % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

The following letter codes are used to indicate the reliability of the estimates:

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--- Suppressed to protect confidentiality

++ Not statistically reliable

— No units exist in universe for this category

**2.4 Proportion (%) of Structures where Select Services are Available¹
by Structure Size
Atlantic Region**

Province	Meals				On-Site Medical Services	On-Site Nursing Services ¹	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Newfoundland and Labrador	0.0	0.0	0.0	100.0	51.3 a	15.4 a	76.9	20.5
10 - 49	0.0	0.0	0.0	100.0	42.1 a	5.3 a	57.9	21.1
50 - 89	0.0	0.0	0.0	100.0	68.8 a	25.0 a	93.8	18.8
90 or more	0.0	0.0	0.0	100.0	25.0 a	25.0 a	100.0	25.0
Prince Edward island	0.0	0.0	0.0	100.0	75.0 a	62.5 a	100.0	8.3
10 - 49	0.0	0.0	0.0	100.0	75.0 a	50.0 a	100.0	0.0
50 - 89	0.0	0.0	0.0	100.0	66.7 a	83.3 a	100.0	16.7
90 or more	**	**	**	**	**	**	**	**
Nova Scotia	0.0	13.5	27.0	59.5	64.9 a	35.1 a	86.5	8.1
10 - 49	0.0	8.3	16.7	75.0	58.3 a	25.0 a	83.3	8.3
50 - 89	0.0	12.5	50.0	37.5	75.0 a	62.5 a	87.5	0.0
90 or more	0.0	40.0	40.0	20.0	80.0 a	40.0 a	100.0	20.0
New Brunswick	1.4	2.8	5.6	90.3	33.3 a	25.0 a	91.7	16.7
10 - 49	0.0	0.0	0.0	100.0	28.3 a	17.0 a	90.6	13.2
50 - 89	8.3	8.3	25.0	58.3	41.7 a	50.0 a	91.7	8.3
90 or more	0.0	14.3	14.3	71.4	57.1 a	42.9 a	100.0	57.1
Atlantic Region	0.6	4.1	8.1	87.2	50.0 a	30.2 a	88.4	14.5
10 - 49	0.0	1.8	3.6	94.6	43.8 a	21.4 a	84.8	11.6
50 - 89	2.4	4.8	16.7	76.2	61.9 a	47.6 a	92.9	11.9
90 or more	0.0	16.7	16.7	66.7	61.1 a	44.4 a	100.0	38.9

¹ Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

² On-site nursing services include RN, RPN or LPN

The following letter codes are used to indicate the reliability of the estimates:

a - Excellent, b - Very good, c - Good, d - Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

2.5 Proportion (%) of Structures with Access to Selected Amenities¹
by Structure Size
Atlantic Region

Province	Transportation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Newfoundland and Labrador	87.2	0.0	0.0	2.6	12.8	66.7
10 - 49	89.5	0.0	0.0	0.0	5.3	57.9
50 - 89	87.5	0.0	0.0	6.3	25.0	75.0
90 or more	75.0	0.0	0.0	0.0	0.0	75.0
Prince Edward Island	70.8	0.0	0.0	12.5	33.3	70.8
10 - 49	68.8	0.0	0.0	12.5	18.8	56.3
50 - 89	66.7	0.0	0.0	0.0	50.0	100.0
90 or more	**	**	**	**	**	**
Nova Scotia	64.9	0.0	8.1	10.8	40.5	78.4
10 - 49	54.2	0.0	12.5	4.2	25.0	75.0
50 - 89	75.0	0.0	0.0	0.0	62.5	75.0
90 or more	100.0	0.0	0.0	60.0	80.0	100.0
New Brunswick	80.6	2.8	6.9	44.4	48.6	72.2
10 - 49	81.1	0.0	0.0	37.7	35.8	67.9
50 - 89	75.0	8.3	25.0	66.7	83.3	75.0
90 or more	85.7	14.3	28.6	57.1	85.7	100.0
Atlantic Region	77.3	1.2	4.7	23.3	36.6	72.1
10 - 49	75.0	0.0	2.7	20.5	25.9	66.1
50 - 89	78.6	2.4	7.1	21.4	52.4	78.6
90 or more	88.9	5.6	11.1	44.4	66.7	94.4

¹ Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

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** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

3.1 Average Rent (\$) of Standard Spaces by Unit Type Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom		Total	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Newfoundland and Labrador	1,800	2,059	**	2,105	2,376	2,890	**	**	2,098	2,130
Prince Edward Island	2,125	2,658	2,386	2,774	2,936	2,818	**	**	2,433	2,785
Nova Scotia	**	**	2,070	2,707	2,642	2,646	2,080	2,082	2,394	2,557
New Brunswick	**	2,267	1,814	2,343	1,763	2,233	2,025	3,263	1,807	2,337
Atlantic Region	1,937	2,234	2,109	2,464	2,200	2,386	2,208	2,643	2,137	2,415

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized;
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2012 to be included in the 2013 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click [here](#).

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement

The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality

All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

CMHC—HOME TO CANADIANS

Canada Mortgage and Housing Corporation (CMHC) has been Canada's national housing agency for more than 65 years.

Together with other housing stakeholders, we help ensure that the Canadian housing system remains one of the best in the world. We are committed to helping Canadians access a wide choice of quality, environmentally sustainable and affordable housing solutions that will continue to create vibrant and healthy communities and cities across the country.

For more information, visit our website at www.cmhc.ca or follow us on [Twitter](#), [YouTube](#) and [Flickr](#).

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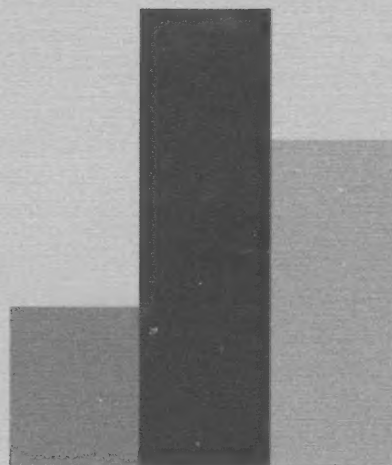
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